



2011 CALIFORNIA VOLUNTEER REFERENCE MANUAL – General Information

Quality Review Checklist

Double-check that names and social security numbers are complete and in the correct order.

Quality Review all returns per IRS and FTB policy.

Make sure Quality Review Sheet is complete.

Double-check the amount of California withholding on Forms W-2 and 1099.

Double-check all Schedule A itemized deductions on Form CA (540).

Check your math and income statements. Double check each information line on the tax return.

Make sure the client signs and dates the tax return.

Enter site information number (SIDN) on every tax return.

Run diagnostics on every computer-generated tax return.